# Make and manage Appointments

Students may only schedule appointments with you during times you have designated as available, either through your office hours or group sessions.

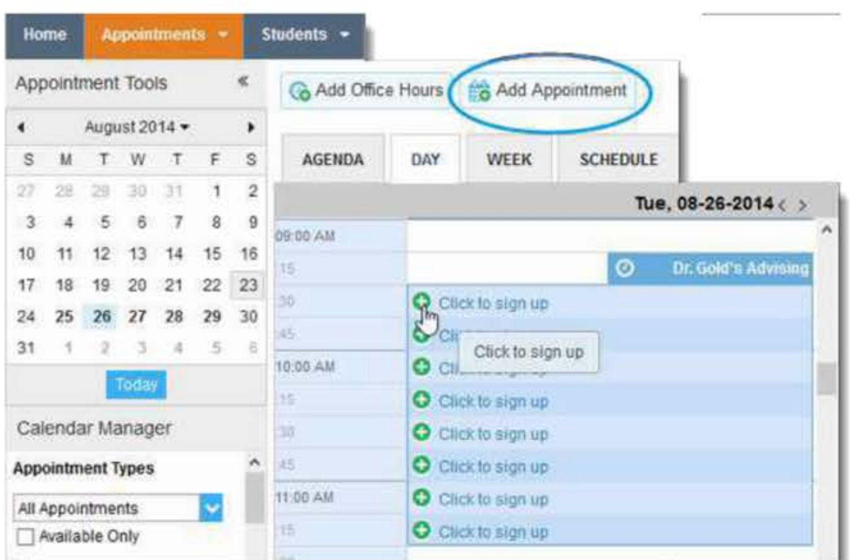
Calendar owners and their designated calendar managers can add appointments wherever they choose with a few exceptions:

- **You cannot overlap a reserved time:** If you use the **Reserve Time** feature to block time on your calendar, you will not be able to add an appointment in the time occupied by the reserved time without first removing the reserved time from your calendar.
- **You cannot overlap a group session**: you cannot add an individual appointment that overlaps with a group session previously added to on your calendar.
- **You cannot overlap an** external hold: If your Starfish calendar is integrated with an external calendar via Exchange or Google integration, you will find "External Holds" on your calendar. These represent items that exist on your other calendar (Outlook or Google). You will not be able to add appointments that conflict with external holds on your Starfish calendar.

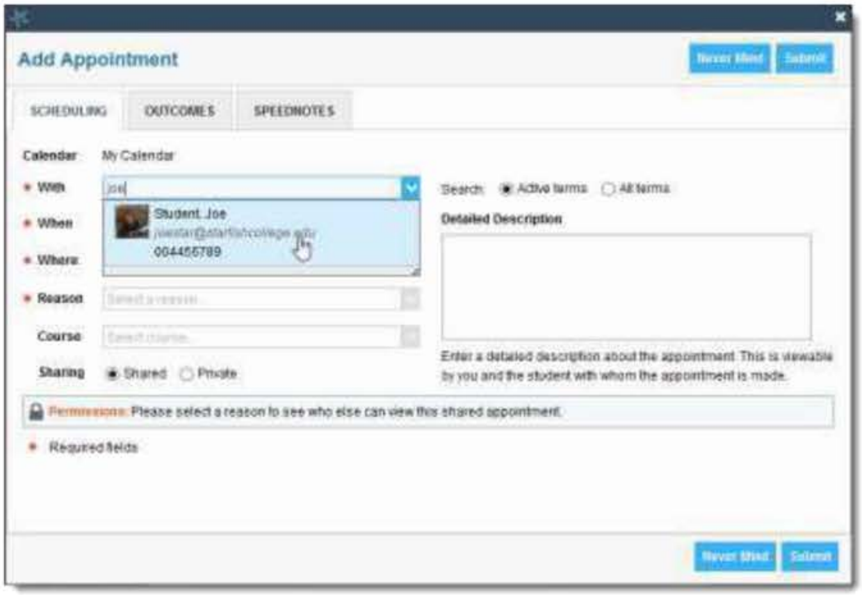
## Add, edit, or cancel appointments on your Starfish calendar

### Add an appointment to the calendar

1. Initiate a new appointment using either of these options:
   - Click the **Add Appointment** button from your **Home** or **Appointments** page.
   - Click the sign up icon (+) for an existing office hour slot using the **Day** or **Week** view of your calendar on the **Appointments** page.



This opens the **Add Appointment** form




2. Begin typing the name of the desired student into the **With** drop down list box. Starfish will find matching students with whom you have a relationship. Select the desired student from the list.

   If you start the appointment from an existing office hour block, the "appointment types" setting in that block may further limit the students available in your list.

3. If you used the **Add Appointment** button rather than selecting an existing time slot, specify **when** the meeting will take place (date, start time, end time).

4. Select the desired location from the options available in the **When** drop down list.

5. Select a **Reason** for the meeting. The reasons available are based on the student you selected and the appointment types that you have access to in your role/ relationship with that student.

   If you have selected a timeslot from a set of existing office hours, the reasons will be further limited to those associated with the appointment types settings for the office hours.

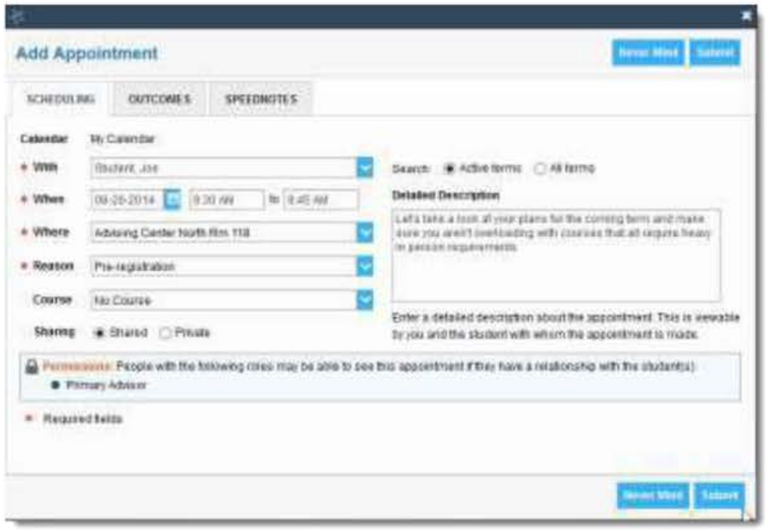
   **Important Note:**
   Each reason is tied to an appointment type. Each appointment type defines which roles may view or modify an appointment of this type, and what SpeedNotes will be available. Once you choose a reason, information about which other roles have permission to see the appointment will be shown in the section labeled **Permissions** ( Permissions:).

6. If relevant to the meeting and permitted by your role, select a **Course** from the list presented.

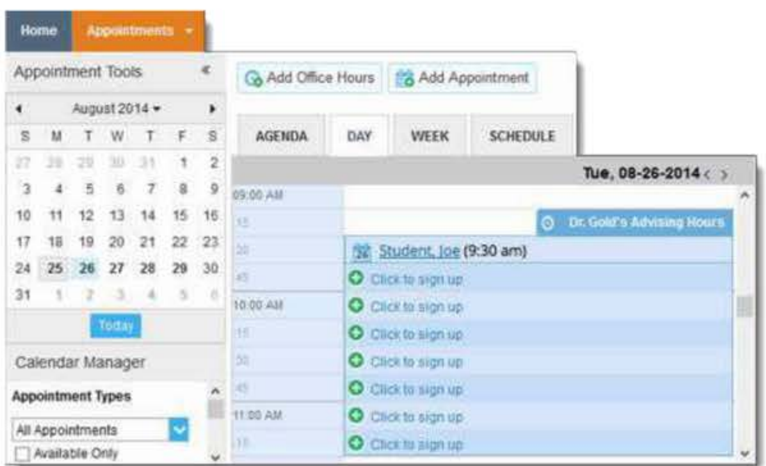
7. Select a radio button for **Sharing** to either make the appointment **Shared** (roles listed in the Permissions area for this student can see the appointment and its outcomes) or **Private** (only the person with whom the appointment is made can see it).

8. Type a **Detailed Description** for the meeting that will be visible/emailed to you and the student.
   **Best Practice:** This is optional but recommended to set expectations for the meeting.

9. Click the **Submit** button to schedule the meeting.




The appointment will appear on the calendar owner's calendar in the selected date and time.




The appointment is also available from the calendar owner's **Home** page on the **Appointments** and **Recent Changes** channel.

The appointment will also appear on the **Meetings** tab of the student folder for anyone that has permission to view the appointment. If you included a detailed description, it will be listed on the Meetings tab.

Both the student and calendar owner will receive an email with an iCal attachment for any ***future*** appointments. Appointments created to document prior meetings will not send an email. If you do not receive an email, check your Email Notification settings.


## Modify scheduling details of an appointment

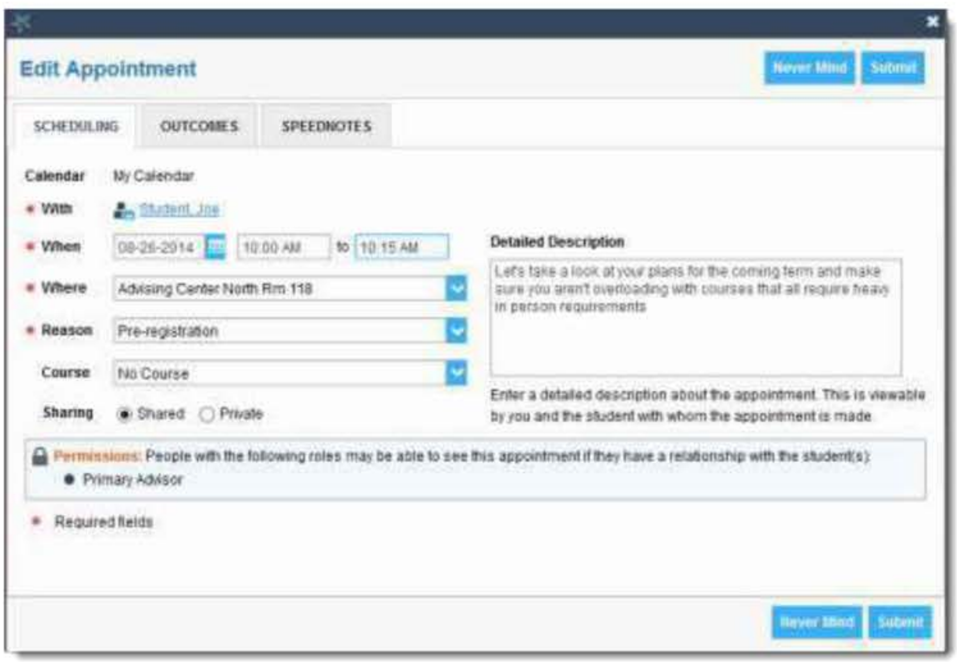
1. Hover over the **Appointment** icon (26) associated with an appointment to open the pop up card and make updates. The appointment is available from your calendar, the **Appointments** or **Recent Changes** channels on your **Home** page, or from the student folder **Meetings** tab.


From the Appointments pop up card you can edit the scheduling details of an upcoming appointment and add or edit outcome details. If configured on your Starfish system, you may be able to use SpeedNotes to document common outcomes.

You can also cancel an appointment from this menu.

2. Select **Edit** from the **Appointment** pop up card to bring up the **Scheduling** tab of the **Edit Appointment** form. From here, you can edit appointment scheduling details including:

   - **When** and **Where** the meeting will occur.
   - The **Reason** associated with the meeting.
     **Note:** This may impact who else can view the meeting, and which SpeedNotes will be available for documenting outcomes.
   - The **Course** associated with the appointment. (optional)
   - The **Sharing** setting for the meeting. Select private if only you, your calendar manager and the student should see this meeting. A shared meeting will be visible to those with a role that has access to the appointment type and a relationship to the student. These roles are noted in the **Permissions** section of the form (Permissions:).
   - **Detailed Description** that is shared with the student and documented on the Meetings tab of the student folder (optional but recommended).

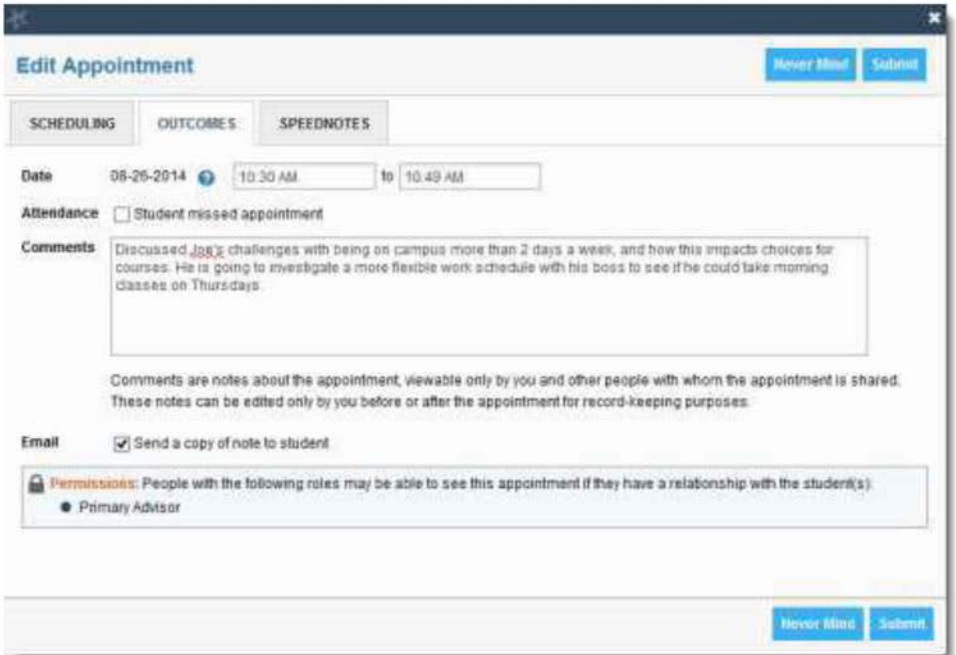



3. Click the **Submit** button to save changes.

   An updated iCalendar (iCal) attachment will be emailed to the student. The calendar owner will also receive the updated iCal if the calendar owner's email notificaitons preferences are set to notify when changes are made to an existing appointment (recommended).

## Document outcomes from a meeting

1. Hover over the **Appointment** icon (26) associated with an appointment.
2. Select **Outcomes** from the **Appointment** pop up card to bring up the **Outcomes** tab of the **Edit Appointment** form.



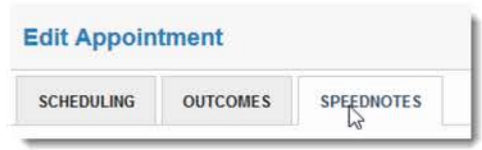

3. Capture the meeting’s ***actual*** start and end time next to the **Date.**
4. If the student is a no-show for a meeting, check the **Attendance** box labeled “Student missed appointment”.
   **Note:** Depending on your institution’s settings, this may trigger an email to the student.
5. Add your notes into the **Comments** box.
   **Note:** Click the **Email** check box labeled “Send a copy of note to student” if your comments should be shared with the student via email.
6. Click the **Submit** button to save your updates.

Your updates will be available in the student folder on the [Meetings](#) tab for this appointment.

## Use SpeedNotes to document common outcomes

SpeedNotes are preconfigured appointment activities that can be checked off to quickly capture recurring meeting outcomes.

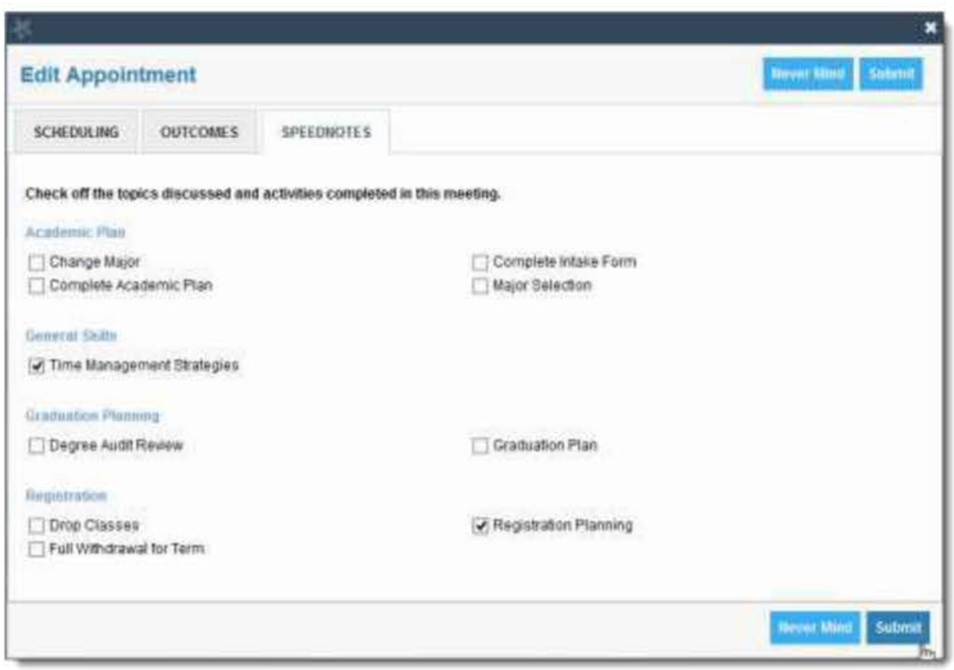
If SpeedNotes exist for any appointment types in your Starfish system, the **SpeedNotes** tab is available whenever the **Edit Appointment** form is open.




If the selected appointment type has no SpeedNotes associated with it, the tab contents will be blank.

**Important Note:**
The reason selected for your appointment on the **Scheduling** tab is connected to an appointment type, and that appointment type determines which SpeedNotes are displayed. If you don't see the SpeedNotes you were expecting, you may need to select a different reason or check with your Starfish administrator.

1. Hover over the **Appointment** icon ( 26 ) associated with an appointment.
2. Select **Outcomes** or **Edit** from the **Appointment** pop up card to bring up the **Edit Appointment** form.
3. Click the **SpeedNotes** tab. Available options may be grouped into categories. Within any category, items are listed alphabetically.
4. Check all boxes that are relevant to your meeting.




5. Click the **Submit** button to save your updates.

### Cancel an appointment

1. Hover over the appointment menu icon ( ) associated with an appointment to bring up the **Appointment** pop up card.

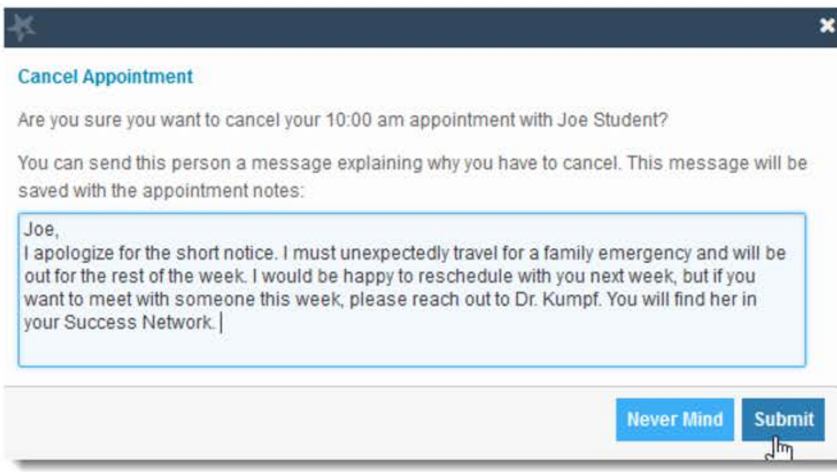
   The Appointment pop up card is available from your calendar, the **Appointments** or **Recent Changes** channels on your **Home** page, or from the student folder **Meetings** tab.

   You can also edit an existing appointment from this menu.

2. Select **Cancel** from the Appointment pop up card.

3. The **Cancel Appointment** form is displayed. Type a note explaining the reason for the cancellation (optional but recommended).

   **Best Practice:** include an explanation for the cancellation, and provide guidance on how to reschedule or connect to other available resources.




4. Click the **Submit** button to cancel the appointment and send a cancellation email (and iCal attachment) to the student.

   The calendar owner will also receive the iCal for the cancellation if the calendar owner's email notifications preferences are set to notify when changes are made to an existing appointment (recommended).

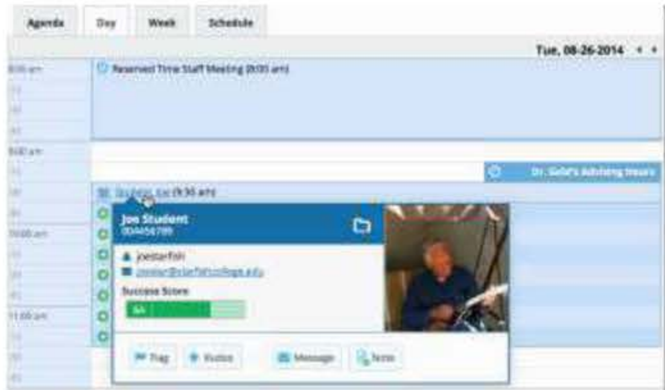
## Review appointment information and meeting outcomes

### Review appointment and meeting information on the student folder

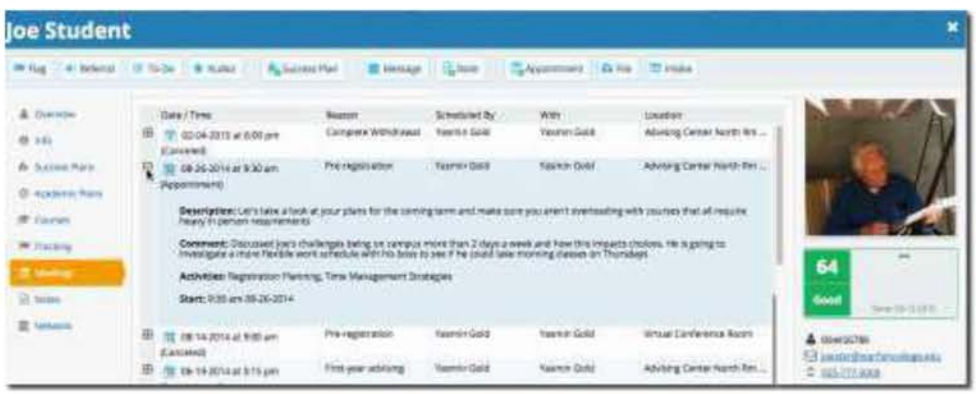
You can open the student folder by clicking on the link associated with the student's name wherever it appears in Starfish.

For example from the **Appointment** channel on your **Home** page.


Or from the appointment on your calendar




Click on the **Meetings** tab of the student folder to review information about upcoming and past meetings for this student.




The **Meetings** tab of the student folder includes upcoming appointment information as well as meeting notes captured in Starfish. It may also include historical meeting information from external systems.

The information that is available to you on the **Meetings** tab is based on the role(s) that connect you to your students and the appointment types those roles have permission to view.

The icons to the left of each meeting in the list provide additional information or available actions related to the meeting:

⊞ Click the expand icon to the left of any appointment listed to view additional details about the meeting. For example the **Description** that was included when the appointment was created, any **Comments** entered on the **Outcomes** tab and any **Activities** that were checked off on the **SpeedNotes** tab.

Hover over the appointment icon to update the appointment.

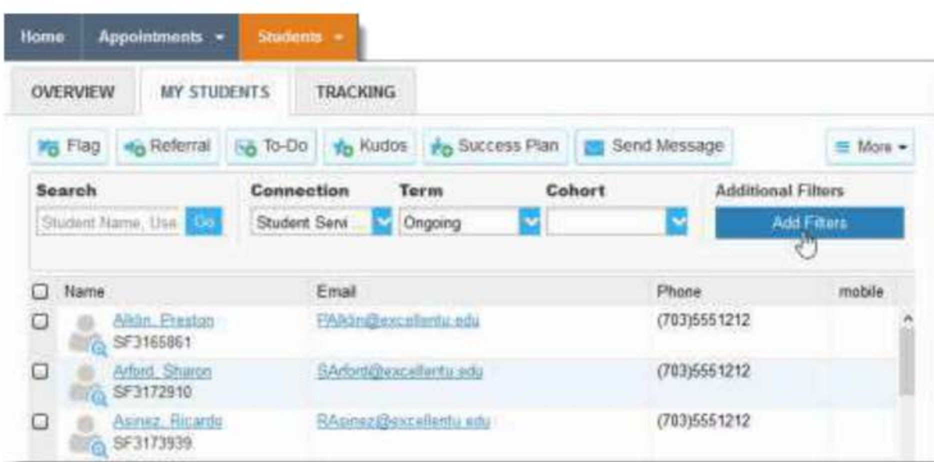
If the student was marked as a no show on the Outcomes tab, the missed appointment icon will be displayed instead of the standard appointment icon.

If the appointment presents information from an external system, the historical appointment icon will displayed. This type of meeting cannot be edited. External meeting will only exist if your institution has imported meeting outcomes from another system (e.g. tutortrac).

## Filter student lists based on meetings

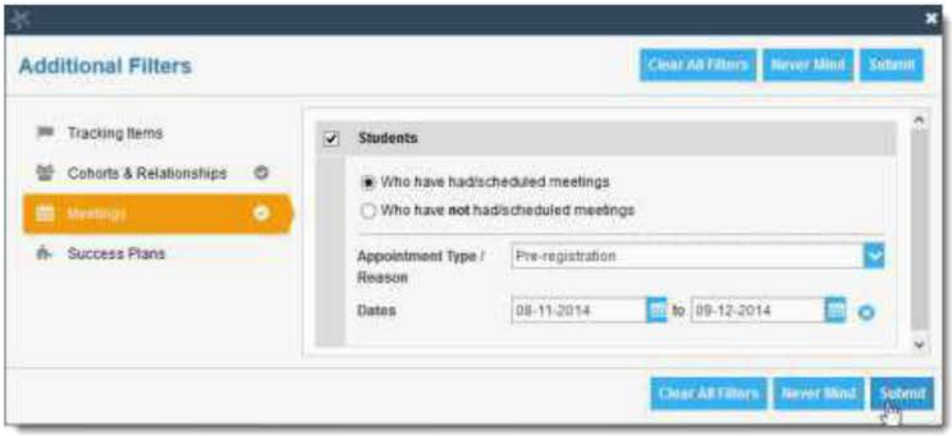
Use the **Meetings** filter from the list of **Additional Filters** available on your **My Students** and **Tracking** tabs to identify students that have or have not scheduled appointments.

1. Click on the **My Students** tab from within your **Students** area in Starfish. Then click the **Add Filters** button.



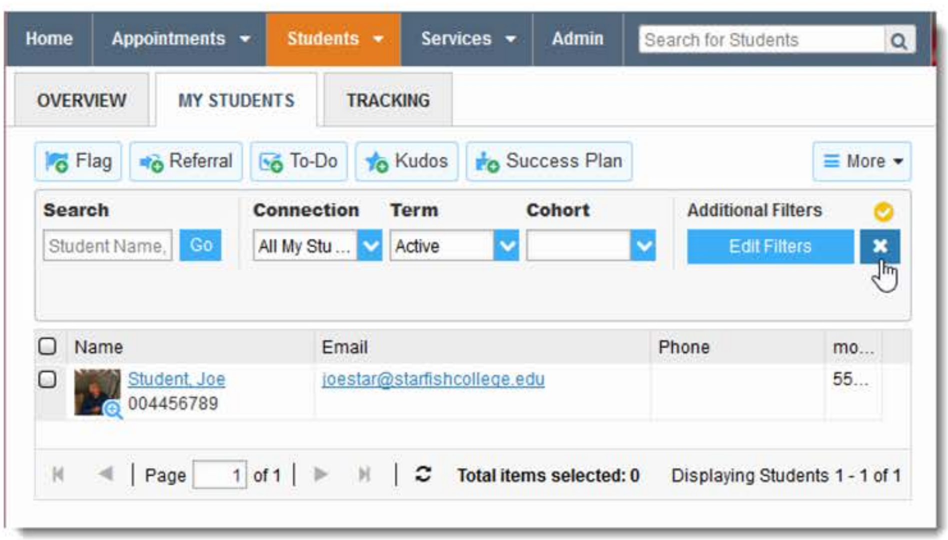
2. Select **Meetings** from the filter options on the left and check the box to the left of the word **Students** in the filter criteria area to make this filter active.

3. Select whether you want to filter to students "Who have had/ scheduled a meeting" or to those "Who have ***not*** had/scheduled a meeting. Optionally, you can filter to a specific **Appointment Type/ Reason** and a range of **Dates**.




4. Click the **Submit** button activate your filter

   Your student list will be displayed showing only those students who matched your Meetings filter criteria.




Click the Clear Filters button ( ) to remove your filter, or click the **Edit Filters** button to modify your filter criteria.

**Note:** Canceled appointments ***will not be*** included in the filter results for students that have had/scheduled an appointment, but scheduled appointments where the student was marked as a no show ***will be*** included.